



Enrollment Event Planning Guide

Planning an Enrollment Event for Covered California

Partners' Tool Kit
Community Relations Division

Table of Contents

I. Overview of Covered California	3
A. Covered California's Vision and Mission	3
B. Target Populations.....	4
C. Goals and Enrollment Forecasts.....	5
II. Planning an Enrollment Event.....	6
A. Facility and Access	7
B. Permits and Safety.....	7
C. Covered California Partners, Local Partners, Volunteers and Exhibitors	8
D. Influencers and Elected Officials	9
E. Equipment, Materials and Supplies	9
F. Media and Marketing	10
G. Suggested Week-by-Week Timeline	12
H. Follow-Up.....	13
III. Covered California Contacts	14
IV. Appendices	14
Appendix A: Speaker / Event Request Form.....	15
Appendix B: How to Engage Consumers Using Twitter	17

I. OVERVIEW OF COVERED CALIFORNIA

A. Covered California's Vision and Mission

The vision of Covered California™ is to improve the health of all Californians by ensuring their access to affordable, quality care. The mission of Covered California is to increase the number of insured Californians, improve health care quality, lower costs and reduce health disparities through an innovative, competitive marketplace that empowers consumers to choose the health plan and providers that give them the best value.

In partnership with the California Department of Health Care Services (DHCS), Covered California is committed to ensuring that Californians are aware of their health care coverage options. Through Covered California, Californians will be able to get financial assistance, compare a range of health insurance plans and choose the right plan for them.

Covered California partners can take advantage of Covered California's tool kit - Enrollment Event Planning Guide - and start planning and holding enrollment events to get Californians interested in and excited about having health care coverage. If you choose to host a community-wide enrollment event, use this document as a logistical planning guide.

Producing a community-wide Covered California enrollment event is a great way to bring marketing, outreach, educational, and enrollment programs to your community. Enrollment events have long been an effective way to enroll individuals and families into health care coverage programs.

When preparing your outreach, education and enrollment support, be sure to anticipate your audience's needs and consider:

- Age.
- Socio-economic status.
- Race and ethnicity.
- Language preferences.
- Values, beliefs and attitudes.
- Gender and sexual orientation.
- Literacy levels.
- Relevancy of pictures, illustrations and graphics.
- Cultural differences.

To maximize your outreach, education and enrollment efforts, consider:

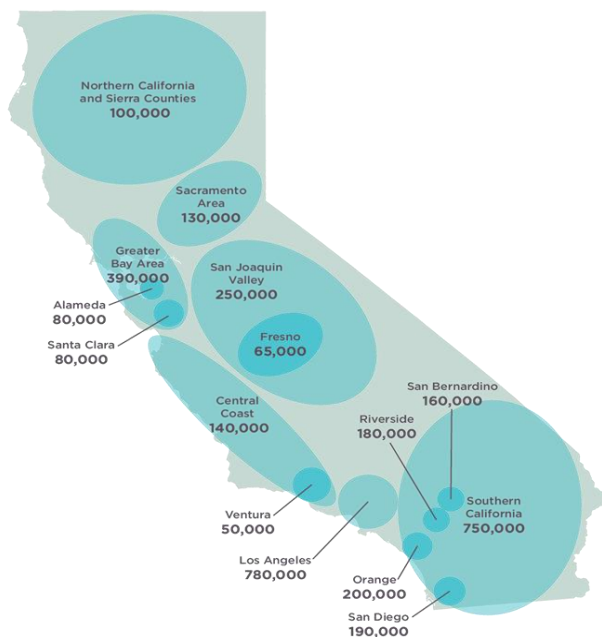
- Target markets or populations.
- Effective communication and marketing.
- Facility location and access.
- Privacy and Security.

B. Target Populations

Covered California's goal is to serve specific segments of populations or communities that have a high number of uninsured individuals, specifically people across different cultures and ethnic groups, millennial, uninsured/underinsured consumers with household incomes between 139 percent and 400 percent of the federal poverty level (FPL), that qualify for federal subsidy or premium assistance.

Specific segments of target populations include:

- Young, healthy adults.
- Populations with limited English proficiency (LEP).
 - Latinos.
 - Asians and Asian Pacific Islanders.
- Culturally diverse populations and communities.
 - African-Americans.
 - American Indians.
 - Families with mixed immigration status.
- Employment sectors with the largest number of uninsured.
 - Construction workers.
 - Restaurant and food services.
 - Hospitality.
 - Agriculture.
 - Landscaping services.
 - Private households.
- Small-business owners with 50 or fewer employees.



This illustration shows an estimate of the population eligible for premium assistance by geographic area.

C. Goals and Enrollment Forecasts

Of the 5.3 million Californians who are uninsured, 2.6 million are likely to be eligible for financial help, 1.4 million individuals are newly eligible for Medi-Cal, and 2.7 million individuals not eligible for federal subsidies but can purchase affordable health insurance through Covered California.

Covered California's goal is, over time, to help insure all eligible Californians. We recognize and have planned for the reality that coverage will grow over time. Based on experience in other states and economic modeling, the forecast enrollment for the first year of operations is as follows:

- By the end of the first open enrollment by March 31, 2013, Covered California expects to have enrolled between 487,000 and 696,000 subsidy-eligible Californians (those eligible for premium assistance).
- By the end of the second open enrollment by Jan. 1, 2015, Covered California expects to have enrolled between 840,000 and 1.2 million subsidy-eligible Californians.

DHCS forecasts more than 1 million people will be eligible for Medi-Cal in 2014, as shown below:

- By the end of 2014, 700,000 newly eligible under the Affordable Care Act.
- By the end of 2014, 350,000 who were previously eligible but will benefit from the new streamlined application.

II. PLANNING AN ENROLLMENT EVENT

Enrollment events are community events that bring people together to learn about, understand and enroll in Covered California health insurance plans and Medi-Cal. Below are key logistical considerations for organizing and hosting an enrollment event targeting specific or diverse uninsured populations or small-business owners.

- Facility and access.
- Permits and safety.
- Covered California partners, local partners, volunteers and exhibitors.
- Influencers and elected officials.
- Equipment, materials and supplies.
- Media and marketing.
- Suggested week-by-week timeline.
- Follow-up.

You may want to consider having the enrollment event as a stand-alone event or in conjunction with an existing community event. A joint event is sometimes beneficial because of the existing infrastructure, staffing and capacity for planning and coordinating an event.

There are many things to consider when planning an event. Some questions you may ask are:

1. Who are your target populations, and how many consumers do you plan to reach? This will help determine the venue, how many organizations to invite and how many enrollment stations are needed.
2. Is the event conveniently located near the target population's home, neighborhood, schools, churches, etc.?
3. When and how often will you host the event?
4. Is the venue large enough to accommodate the anticipated crowd and setting?
5. What will be done to protect consumer privacy (e.g., spacing or partitions or both)?
6. Will there be space for workshops or informational sessions? This could be a designated area. We recommend that you provide each partner/exhibitor with a 10-foot-by-10-foot space, or a larger space if needed.
7. Is there access to electricity outlets? Will extension cords or generators be required?
8. Is there ample and convenient parking?
9. Will traffic control be a problem?
10. Is this a stand-alone or combined event? If this is a stand-alone event, select a date that does not conflict with major festivals, holidays or community events. Weekends are recommended.

A. Facility and Access

Identify the appropriate host organization(s) and venue for each enrollment event. The venue should be convenient, recognizable and easily accessed. Other considerations for determining a venue are listed below.

- Facility space appropriate for the anticipated size of attendees.
- Parking (cost and access).
- Americans with Disabilities Act (ADA) compliance and accessibility.
- Language assistance and translation services.
- Secure Wi-Fi or cable network capability, whichever is preferred
- Audio-visual equipment (personal computers or laptops, printers, copiers, microphones, tablets) — consider vendor costs, access, staffing and others.

Suggestions for venue locations include:

- Community centers.
- Schools.
- Community colleges or universities.
- Places of worship.
- Libraries.

B. Permits and Safety

Identify possible risks and develop strategies to minimize risks. To plan a safe and successful community event, while managing risk and liability, consider the following:

- Permits or preapprovals. Apply for all required permits and necessary approvals, as needed:
 - For food to be sold or given away, if any.
 - For street closures.
 - For a special event.
 - For building and equipment safety.
- Safety and security on site.
- An emergency preparedness plan.
- A contingency plan.

Waiver of Liability — It is important to add a disclaimer on all materials and products stating that the organizer and Covered California are under no circumstances liable for any harm, damages or injuries — whether direct, indirect or incidental — that might occur as a result of their participation in the event.

C. Covered California Partners, Local Partners, Volunteers and Exhibitors

The goal of enrollment events is for individuals and families to receive in-person enrollment assistance for health care coverage. When considering partners and exhibitors, identify key Covered California partners, organizations and volunteers serving diverse or specific population groups and those who could provide enrollment or in-language assistance.

These key local partners include Covered California partners:

- Covered California Certified Enrollment Entities (CEEs) / Certified Enrollment Counselors (CECs) — in-person enrollment assistance.
- Covered California Certified Insurance Agents/Brokers — in-person enrollment assistance.
- Community Outreach Network partners — outreach and education.
- Covered California Certified Educators, also known as grantees — outreach and education.

Covered California's partners play a vital role in educating and helping individuals prepare electronic or paper applications to establish eligibility and enroll in coverage through Covered California. This includes steps to help individuals find out if they qualify for insurance affordability programs (including premium assistance, cost-sharing reductions and Medi-Cal) using the **Shop and Compare Tool** available on CoveredCA.com and, if they are eligible, to help them enroll.

To identify who in your community is approved and certified to enroll consumers at your enrollment event, go to “**Find Help Near You**” feature at Covered California's website at www.coveredca.com/enrollment-assistance/.

In the event that you need additional support or need to locate local Covered California partners when planning an enrollment event, please complete and submit Covered California's “**Speaker/Event Request Form**” (see Appendix A).

Other key local partners may include:

- Local county health care workers.
- The county's department of public health.
- The county's department of social services.
- Local colleges or universities — for volunteers and language assistance.
- Federal, state and local programs.
- One-stop employment services, libraries, etc.
- Exhibit vendors.

D. Influencers and Elected Officials

Identify the appropriate participants who are influencers in the community. Request the community influencers to invite the public, as well. Some of the community influencers to approach include:

- Elected state or local officials.
- Community-based organization leaders.
- Faith-based organization leaders.
- Business leaders.
- Civil rights leaders.
- Community activists.
- Labor leaders.
- Physicians and health care providers.

E. Equipment, Materials and Supplies

Identify and prepare adequate supply of materials, equipment and supplies for each enrollment event. It's important to include the "must have" equipment, materials and supplies to make the enrollment a successful event.

"Must have" equipment, materials and supplies include:

Equipment.

- Laptops or tablets - may be provided by the organizer or
- Covered California Certified enrollers. It is important to
- Ensure that the laptops used for enrollment are secure and
- protected to safeguard consumer privacy.
- Printers.
- Secure Wi-Fi or cable network connectivity.

Materials.

- Required documents - to inform consumers what to bring for enrollment – ideally BEFORE the event.
 - Proof of identity.
 - Proof of U.S. citizenship or residency status.
 - Income documents (W-2s and last year's tax filings).
- Covered California paper enrollment applications.
- Fact Sheets or education materials in appropriate languages.
- Covered California collateral materials and displays - Covered California Outreach and Education Program grantees will bring these materials to the event, if participating.
- Enrollment work stations with privacy.

Supplies

- Tables and chairs.
- Pens and papers.

Other optional materials and supplies to consider for a successful event:

- Event and directional signs, banners or posters.
- Fliers and ads.
- Giveaway bags.
- Balloons and ribbons.
- Food and water for staff and volunteers.

F. Media and Marketing

Media plays a critical role in the success of an enrollment event. Work with appropriate ethnic media outlets for effective outreach to the targeted population/community prior to, during and after the enrollment event.

Some media activities include:

- **Hosting pre-enrollment information sessions** for your constituents and media in your community or airing/printing stories one to two weeks before the event.

This will allow the press to help spread the word to those who can benefit from Covered California. Also consider using the event as an opportunity to schedule local newspaper and public interviews leading up to the actual enrollment event.

This is also a great time to educate the consumers what pertinent documents they must bring to the enrollment event so they will be prepared and ready to enroll.

- **Use Facebook, Twitter, YouTube and other social media** to share important information and announcements. You can record and send out public service announcements about Covered California and share stories about constituents that can benefit from the affordable health insurance coverage available through Covered California.

New to Twitter? Read “How to Engage Consumers Using Twitter” in Appendix B.

For questions and assistance with media or media inquiries, contact Covered California's media line at **(916) 205-8403** or email at: **media@covered.ca.gov**

You can also contact one of the regional information officers:

- Angie Blanchette, angie.blanchette@covered.ca.gov
San Francisco Bay Area and Northern California.
- Claudie Kiti-Bustamante, claudie.kitibustamante@covered.ca.gov
Los Angeles, Orange, and San Diego counties.
- Edith Lara-Trad, edith.lara-trad@covered.ca.gov
Inland Empire.
- Athena Fleming, athena.fleming@covered.ca.gov
Central Valley.

G. Suggested Week-by-Week Timeline

Plan at least one to two months prior to your enrollment event. This should allow time to invite other organizations, promote the event and coordinate logistics. Allow more time if you are planning a large event targeting at 1,000 or more attendees. Many things may need to happen concurrently, based on timelines, the scale of the event and the size of the crowd and partners.

Four to six weeks before the event:

- Form an event planning committee and subcommittees.
- Secure an event venue.
- Apply for necessary permits or approvals.
- Identify potential sponsors/donors, partners, exhibitors and volunteers.
- Reach out to media and develop a public service announcement.
- Create a site layout plan and firm up event details.
- Notify Covered California of your enrollment event. Complete the **Speaker/Event Request Form** (Appendix A) and email it to kelsey.lindelof@covered.ca.gov.

Three to four weeks before the event:

- Schedule pre-enrollment event/activities.
- Send confirmation letters to sponsors, partners and elected officials.
- Finalize fliers and posters to post in the community.
- Begin to develop press releases and ads for TV/radio or print.
- Order materials and supplies.
- Finalize contracts with the vendor and arrange for delivery of equipment and supplies.
- Begin recruiting volunteers.

Two to three weeks before the event:

- Draft and distribute a media advisory for the pre-enrollment informational event and make follow-up calls to media. *It is important to make follow-up calls to media contacts, especially the day before or the morning of the event, as a reminder to them.*
- Publicize the enrollment event through social media outlets.
- Confirm attendance of Covered California partners.
- Confirm attendance of sponsors/partners and elected officials.
- Confirm volunteers.
- Confirm the delivery of materials, equipment and supplies with vendors.
- Finalize the enrollment event layout, including entrances, exits, information booths, restrooms, etc.
- Assemble press kits containing items such as a press release, fact sheets, member descriptions, a listing of the day's activities and local resources for the uninsured consumers.

- Print signage and posters for the day of the event.

One week before the event:

- Hold pre-enrollment informational meetings or workshops for consumers to inform them of what documents they should bring to the enrollment event.
- Hold a media kick-off event to generate publicity for the enrollment event.
- Draft and distribute a media advisory for the enrollment event and make follow-up calls to media contacts.
- Publicize the enrollment event through social media outlets (**refer to Appendix B, “How to Engage Consumers Using Twitter”**).
- Hang banners and put out fliers.

After the event:

- Send thank-you notes to all vendors, volunteers and partners.
- Return all rented equipment.
- Do a post-event evaluation.

H. Follow-Up

Results to be evaluated include:

- The number of attendees.
- The number of enrollments and leads.
- The number (and reach) of media.
- The number of influencers and elected officials in attendance
- Comments or feedback for improvement from attendees and partners.

III. COVERED CALIFORNIA CONTACTS

- Consumer website: www.CoveredCA.com.
- Service Center: English (800) 300-1506; TTY: (888) 889-4500 (Monday through Friday, from 8 a.m. to 8 p.m.; and Saturday, from 8 a.m. to 6 p.m.).
- Partner/stakeholder website: www.coveredca.com/hbex/.
- Facebook: www.facebook.com/CoveredCA.
- Twitter: twitter.com/CoveredCA.
- YouTube: www.youtube.com/coveredCA.
- Community Outreach Network:
CommunityOutreachNetwork@covered.ca.gov.
- Enrollment Assistance Program Help Desk: (888) 402-0737 (Monday through Friday, 8 a.m. to 5 p.m.); email: assisterinfo@ccgrantsandassisters.org.
- Agent and Small Business Health Options Program (SHOP) Service Center: (877) 453-9198.
- Media line: (916) 205-8403.
- Speaker/event requests: Kelsey.lindelof@covered.ca.gov.

IV. APPENDICES

The following pages contain the appendices listed below, to help you plan your enrollment event.

- APPENDIX A: Covered California's Speaker/Event Request Form
- APPENDIX B: How to Engage Consumers Using Twitter

Appendix A: Speaker / Event Request Form

Complete as much information as you have about your event and speaker requirements. Please submit requests at least **four** weeks prior to the event. Once completed, e-mail the request to: Kelsey Lindelof, Stakeholder Engagement, Covered California at Kelsey.Lindelof@covered.ca.gov.

Your Organization:

Sponsoring Organization	Type of Organization
Contact Name	Contact Phone
Contact E-mail	Website

Your Program:

Date of Program	Time of Program
Name of Program	
Theme/Purpose of the Program	
Location of Program	
Proposed Topic	
Requested Speaker (if you are interested in a particular speaker)	
Presentation Format (panel, speech, roundtable, tabling, etc.) Presentation	Length of Speaker's

Your Audience Composition:

Size of audience	Audience Composition (consumers, stakeholders, employers, other)
Languages needs?	



Your Event Logistics:

Resource Needs:

Check the type and number of resources desired from Covered California:

☐ Outreach & Education (Certified Educator) Number of Educators Needed:

☐ In-Person Assistance (Certified Enrollment Counselors) Number of Counselors Needed:

☐ Speaker

☐ Covered California Staff:

☐ Community Relations

☐ Public Information Officer to assist with media

☐ Other: _____

Notes or Comments:

For information and details on planning an enrollment event for Covered California, please refer to the **Partners' Tool kit – Enrollment Event Planning Guide**.

Appendix B: How to Engage Consumers Using Twitter

Using Twitter is one effective way Covered California partners can get the word out about Covered California. It is a great way to engage consumers in conversations about affordable health care and to promote community outreach and enrollment events. Some of you may already be tweeting, while others may be new to the world of tweeting.

Five Easy Steps to Start Tweeting

- 1) Create a new account at **Twitter.com**.
- 2) Find others to follow. You may go to the **#Discover** button at the top of Twitter and type a word into the search engine to find people and organizations to “follow.”
- 3) Start tweeting.
 - Tweets are limited to 140 characters. Compose a concise tweet about your event. Use **hash tags (#)** to categorize information, such as **#CoveredCA** or **#GetCovered**.
 - Mention others in your tweet by using the **@ symbol** with their Twitter username so that you get the attention of someone you’d like to see your tweet. For example, if you use **@CoveredCA**, we will notice.
- 4) Add photos to your tweets. A picture is worth a thousand words. Take a photo and upload it to **Twitpic.com** and attach it to your tweet message.
- 5) If you see something you like or want to share, **retweet (RT)** it on your Twitter account to let others know.

For help with tweeting, contact Twitter’s Help Center at <http://support.twitter.com/> or email Anne Williams at Anne.Williams@covered.ca.gov.

We hope to see you on Twitter and look forward to retweeting your posts!